Sandata EVV and DODD Providers

Intended Audience: DODD providers using the Sandata EVV System
Developed March 2022

Agenda

- Review terms and definitions
- Manage client and employee records
- Connect EVV and visit capture
- End a visit for one client in a group (ratio changes)
- Visit maintenance
- Questions

Review Terms and Definitions

Review Terms and Definitions

Agency Provider: An entity that provides care to an individual and records services using EVV

Non-Agency Provider: A provider that provides care to an individual and records and manages services using EVV

Sandata EVV: The online portal used to manage Sandata EVV visits and records (https://evv.sandata.com)

Review Terms and Definitions

Client: An individual who receives services subject to EVV requirements

Employee: A person who is employed by an agency provider to provide care to one or more clients (individuals)

Review Terms and Definitions

Sandata Mobile Connect (SMC): Sandata's mobile visit verification option; an application that can be downloaded onto a personal smart device or run on a Sandata EVV device

Telephony: Sandata's telephone visit recording option; providers dial an automated line and answer questions to record a visit.

Review Terms and Definitions

Exception: An indicator of missing or inaccurate information in Sandata EVV

Verified Visit: A visit that does not contain any exceptions

Processed Visit: A visit that does not contain any exceptions, and has been matched with a claim

EVV Visit Capture Review

Complete EVV Training → Download Welcome Kit → Log in to EVV Portal → Setup Client and Employee Records → Log EVV Visits → Fix any errors → Visits are matched with claims

Ohio Department of Medicaid

Sandata
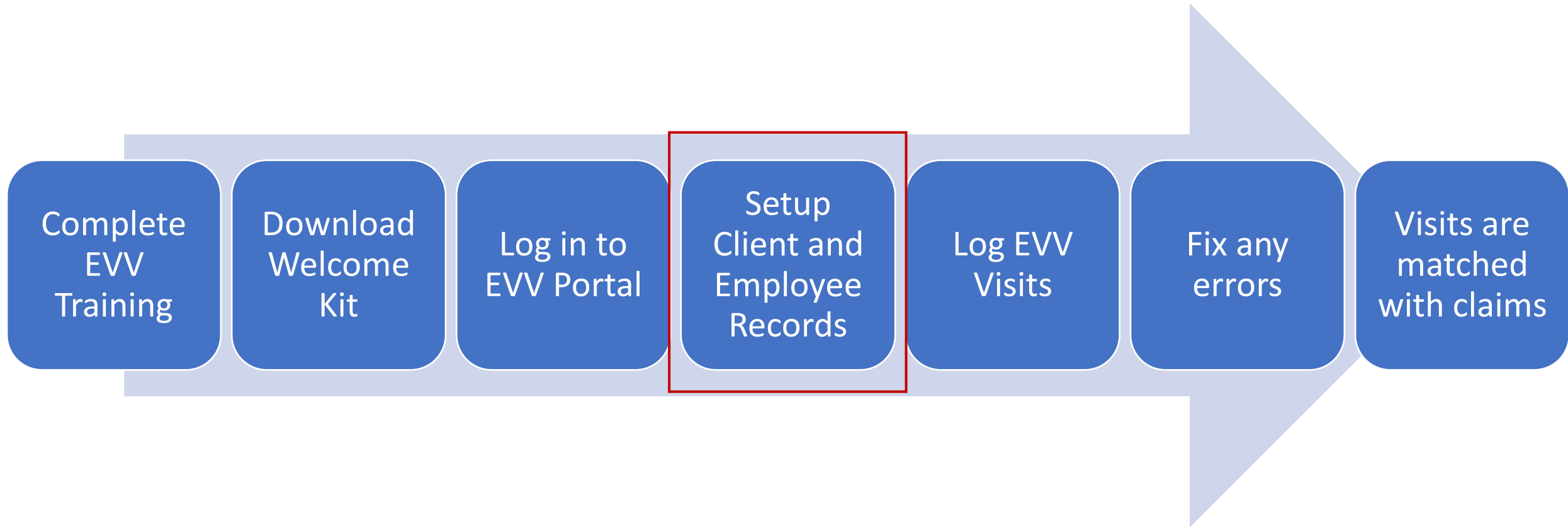
Manage Client & Employee Records

Create Client Records

The client (individual) record must be completed before the client can be associated with a visit. Please double-check the following fields when creating the client record:

- First name
- Last name
- Client Medicaid ID number (NOT provider Medicaid ID)
- Payer, program and service
- Service start date

Create Client Records

For help identifying your client's Medicaid ID number, please contact DODD, or the county board of DD.

Create Client Records

HPC, Participant-Directed HPC, and IO waiver nursing services will have DODD as the payer

Create Client Records

Visits that are not Participant-Directed should be logged using the above Payer, Program, and Service options.

Create Client Records

Hint: If you submit timesheets to Morning Sun, you should use the above payer, program and service combination.

Modify Client Records

Client Details	
Client Name	This is important when there is a typo or the individual's name changes.
Client Medicaid ID	Agency providers can correct a client Medicaid ID when entered incorrectly. Independent Providers must call the EVV provider Hotline.
Emergency Contact	Add, remove, or update Emergency Contact information in EVV.
Payer, Program, Service	You can end-date a service, add a service, or modify a service in the event it was entered incorrectly.
Client Address	This should be the address or addresses where services are typically provided as authorized on the All Service Plan.
Client Phone Number	This should be the phone number used for Telephony (TVV) if that is how visits will be captured for the individual(s) you serve. More than 1 phone number can be listed in this section.

Modify Client Records

Modify Client Records

Create Employee Records – Agencies Only

The employee record must be completed by the agency before the employee can be associated with a visit. Please double-check the following fields when creating the employee record:

- First name
- Last name
- Email address
- Social security number
- The 'mobile user' box is checked

Create Employee Records – Agencies Only

Modify Employee Records – Agencies Only

Client Details	
Employee Name	This is important when there is a typo or the employee's name changes.
Social Security Number	Agency providers can correct a social security number when entered incorrectly.
Email Address	This is important when there is a typo or the employee's email address changes. The email address is used to access Sandata Mobile Connect.
Mobile User Checkbox	This box must be checked to allow employee access to Sandata Mobile Connect.

Modify Employee Records – Agencies Only

Modify Employee Records – Agencies Only

Connecting EVV & Visit Capture

Visit Capture Review

There are three ways to capture an EVV visit:

- Sandata Mobile Connect (SMC)
  - Application that can be downloaded onto a personal smart device or run on a Sandata EVV device
  - This is the primary and preferred method of visit capture
- Telephony
  - Dial an automated line and answer questions to record a visit
- Manual Entry
  - Sign in to https://evv.sandata.com to record a visit

Sandata Mobile Connect Tools

	Agency Providers	Non-Agency Providers
Company ID	2-XXXX (STX12345 = 2-12345)	2-10086
Employee Username	Email address entered into the employee record	Email address used for EVV
Client ID*	Client record, underneath the name field	Client record, underneath the name field
Service	Auto-populates from the client record	Auto-populates from the client record

Client ID – SMC

If using Sandata Mobile Connect, enter the client ID number or client Medicaid ID number on the search client screen

Service Selection – SMC

If using Sandata Mobile Connect, all services from the client record will display automatically as options to select

Telephony Tools

	Agency Providers	Non-Agency Providers
Toll-Free Number	Call Reference Guide, located in eTRAC Welcome Kit	Call Reference Guide, located in eTRAC Welcome Kit
Employee Santrax ID	Employee record, underneath the name field	Call Reference Guide, located in eTRAC Welcome Kit
Client ID*	Client record, underneath the name field	Client record, underneath the name field
Service ID	Service ID list, located in eTRAC Welcome Kit, or click HERE	Service ID list, located in eTRAC Welcome Kit, or click HERE

Client ID – Telephony

Ohio Department of Medicaid

Last Name	First Name	Client ID
Smith	James	399962

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6. Press the (1) key to "Call In".

   Santrax will say: "Received at (TIME). Please enter first client ID or hang up if done."

7. Press the numbers of the client's ID.

   Santrax will say: "Received at (TIME). Please enter first client ID or hang up if done."

8. Hang up.

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Service ID – Telephony

Client Payer

Add New   History

FROM DATE	TO DATE	CLIENT PAYER ID	PAYER	PROGRAM	SERVICE	ACTIONS
01/13/2022			ODM	SP	SPHH Nsg - LPN (G0300)	✏ 🗐

Showing 1 to 1 of 1 entries   « < 1 > »

Ohio Service List

Write your Santrax ID above for easy reference

English toll-free numbers. Please refer to your Call Reference Guide for additional languages.

Service ID	Description	Service ID	Description
101	SPHH Aide (G0156)	616	Passport - LPN (T1003)
105	Physical Therapies (G0151)	636	IO NSG - LPN (T1003)
115	Occupational Therapies (G0152)	656	My Care - LPN (T1003)
125	Speech Language Pathology Therapies (G0153)	707	OHCW HCA (S5125)
202	SPHH Nsg - RN (G0299)	717	Passport HCA (S5125)
303	SPHH Nsg - LPN (G0300)	727	Passport - Waiver Choices HCAS (T2025)

Visit Capture Review

These data points must be captured for the visit to be verified:

- Caregiver information
    - Username or Employee Santrax ID
- Individual receiving service
    - Client ID or Client Medicaid ID
- Service provided
- Start and end date and time of visit

Visit Maintenance

Visit Maintenance Overview

You should review visits in the EVV portal to make sure:

- The visit is captured
- The visit has both a call in and a call out
- The visit has all the required pieces of information

Visits with missing or incorrect information may have exceptions

- Visits with exceptions are **not Verified**
- All exceptions must be resolved for a visit to reach a Verified status

Visit Capture Overview

Log EVV Visits

If visits are not Verified, fix any errors

Verified visits are matched with claims, status changes to Processed

Searching for Visits

Exporting Visit Maintenance

Exception Handling

The EVV Video Library has a section that covers how to resolve each type of exception:

https://fast.wistia.com/embed/channel/vkywg2l6bp

Tips for DODD Visits in EVV

Be sure your visits do not span more than 1 calendar day in EVV

▶ DODD visit that begins on Feb. 1, 2022, at 10 p.m. and ends on Feb. 2, 2022, at 7 a.m. needs to be captured as two separate visits in EVV. This can happen one of two ways:

- The direct care worker can end the visit at 11:59 p.m. and start a new visit at midnight on Feb. 2, 2022, or

- After the 10 p.m.- 7 a.m. visit has ended, the visit is manually changed either in Sandata's Visit Maintenance or your Alt EVV Vendor's system (depending on which system you use). The manual change needs to reflect two separate visits:

  1. Feb. 1, 2022: 10-11:59 p.m., and

  2. Feb. 2, 2022: midnight-7 a.m.

Tips for DODD Visits in EVV

DODD rounding

▶ DODD uses a roll-up approach for each service and each calendar day.

- Example: ABC Homecare has logged the following visits for Sally.

Date	Start Time	End Time	Service	Total Minutes
3/1/2022	7:05am	12:55pm	HPC	355
3/1/2022	3:01pm	9:30pm	HPC	389
3/1/2022	10:00pm	11:59pm	HPC	119
3/2/2022	12:00am	7:00am	HPC	420
3/2/2022	7:00am	1:00pm	HPC	360
3/2/2022	3:15pm	9:35pm	HPC	380
3/2/2022	10:01pm	11:59pm	HPC	118

3/1/2022 = 863 minutes
863/60 = 14 hours and 23 minutes = 58 units

3/2/2022 = 1278 minutes
1278/60 = 21 hours and 15 minutes = 85 units

https://medicaid.ohio.gov/static/Providers/EVV/Providers/Time-to-Units-Conversion-Table.pdf

Ratio Changes (Group Visits)

Ratio Changes

The EVV system uses a group visit to indicate when services are being provided to more than one client at the same time.

When a group visit is in progress, you can add a different end time for each client, or, add the same end time for all clients in the visit.

We will review how to add a different start and end time for each client.

Ratio Changes

Ratio Changes

Ratio Changes

A group visit in progress will look like a file folder, with a play button and a minus button

- Play = end the visit for one client
- Minus = abandon the visit for one client

Ratio Changes

Use the play button to end the visit for only one client

Ratio Changes

The group visit now continues with the remaining client(s)

In Visit Maintenance, each client will have their own visit with call times

GROUP VISIT

GROUP VISIT 504647

Jessica Doe

Service: HPC

Monday, March 14

ADD CLIENT

COMPLETE GROUP VISIT

ABANDON GROUP VISIT

Review EVV Help

Review EVV Help

Provider Guides
- [Non-Agency EVV Participant Guide](#)
- [Agency EVV Participant Guide](#)

EVV Video Library

- https://fast.wistia.com/embed/channel/vkywg2l6bp

*Please note: The videos in the EVV Video Libraries do not meet the training requirement for the EVV program. If you have a question about how to meet the training requirement, please reach out to the EVV Provider Hotline at 855-805-3505, or
email ODMCustomerCareEmail@sandata.com

Review EVV Help

Provider 1-1 Sessions & Virtual Office Hours
- https://go.oncehub.com/ODMEVVHelp

ODM EVV Fact Sheet
- https://medicaid.ohio.gov/static/Families%2C+Individuals/ Programs/EVV/Documentation/FactSheet.pdf

Questions

Reach Out with Questions

EVV Provider Hotline:

For help with a device or the EVV Portal, call 855-805-3505 or email
ODMCustomerCareEmail@sandata.com

Hours of Operation:
- ▸ Mon-Fri, 7am-8pm
- ▸ Sat-Sun, 9am-5pm

ODM EVV Team:

For general EVV questions, email ODMEVV@Sandata.com or leave a voicemail at 614-705-1082

ODM Provider Assistance Hotline:

For help with changing contact information in MITS or claims questions call 800-686-1516